**NEW APPLICATION**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **NOTE:** | | | | **This form is to be completed, signed and submitted to the Purchasing Department for the request to be approved and executed.** | | | | | | | | | | | | | | | | | | |
| **1. Check One: User (Only) Request\_\_\_\_\_ User & P-Card Request\_\_\_\_\_** | | | | | | | | | | | | | | | | | | | | | | |
| **Name:** | | | | |  | | | | |  | **Department:** | | |  | | | | | | | | |
|  | | | | | (User **/** Cardholder) | | | | |  | (If Department has multiple “Groups” please indicate the desired group assignment for the cardholder below) | | | | | | | | | | | |
| **Date of Birth:**  **Phone:** | | | | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |  |  | | | | | | | | | | | |  |
|  | | | | |  | | | | |  |  | | | | | | | | | | | |  |
| **Email:** | | | | |  | | | | |  |  | | | | | | | | | | | |  |
|  | | | | |  | | | | |  |  | | | | | | | | | | | |  |
| **2. Choose ONE of the following:** | | | | | | | | | | | | | | | | | | | | | | |
| **Select one (1) of the following profiles:**  (Monthly spending limit)  **NOTE: By selecting one of the profiles the single transaction limit will automatically default to the amount listed below each profile.** | | | | | | | | | | | | | | | | | | | | | | |
| \_\_\_\_\_ **$1,000.00** \_\_\_\_\_ **$5,000.00** \_\_\_\_\_ **$10,000.00**  ($999.99 Single Transaction Limit) ($999.99 Single Transaction Limit) ($999.99 Single Transaction Limit) | | | | | | | | | | | | | | | | | | | | | | |
| \_\_\_\_\_ **$20,000.00** \_\_\_\_\_ **$30,000.00** \_\_\_\_\_**$50,000.00**  ($3,500.00 Single Transaction Limit) (3,500.00 Single Transaction Limit) ($3,500.00 Single Transaction Limit) | | | | | | | | | | | | | | | | | | | | | | |
| **NOTE:** | | | **Per the Purchasing Policy, $30,000.00 - $50,000.00 limits are for Fleet Operations employees only.** | | | | | | | | | | | | | | | | | | | |
| **For card limits of $20,000.00 - $50,000.00 will require justification of higher limit.** | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | |  |  | | |  | | | |  |  | |
| 1. **3. Will the cardholder be allocating their transactions?** | | | | | | | | | | | | **Yes:** |  | | |  | | | | **No:** |  | |  |
| (Enter account, description and public purpose into the WORKS program) | | | | | | | | | | | |  | | |  | | | | | | | |
|  | | | | | | | | | | | |  | | |  | | | | | | | |
| **4. Explanation for granting $3,500.00 single transaction limit or $20,000.00 or greater card limit to employee:** | | | | | | | | | | | | | | | | | | | | | | |
|  |  | | | | | | | | | | | | | | | | | | | | | |  |
|  |  | | | | | | | | | | | | | | | | | | | | | |  |
|  |  | | | | | | | | | | | | | | | | | | | | | |
|  |  | | | | |  | |  | | | | | | | |  | |  | | | |  |
|  |  | | | | |  | |  | | | | | | | |  | |  | | | |  |
|  | **Department Director** | | | | |  | | **Print Name** | | | | | | | |  | | **Date** | | | | |  |
|  | | | | | |  | |  | | | | | | | |  | |  | | | |  |
| **I certify that the cardholder named above has received the required training per purchasing policy and their Pcard has been issued.** | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | |  | | | | | | | | | |  | | | | |
|  |  | | | | |  | |  | | | | | | | |  | |  | | | | |  |
|  | **Purchasing Director or Designee** | | | | |  | | **Print Name** | | | | | | | |  | | **Date** | | | | |  |
|  | | | | | | | |  | | | | | | | | | |  | | | | |

**MAINTENANCE FORM**

**1. Maintenance of Existing Account**

**Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Card No.:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**a.\_\_\_\_\_\_\_\_\_\_Increase profile limit to:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**b.\_\_\_\_\_\_\_\_\_\_Increase Single Transaction Limit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**c.\_\_\_\_\_\_\_\_\_\_Change Name to:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**d.\_\_\_\_\_\_\_\_\_\_Transfer to another group (Department):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**e.\_\_\_\_\_\_\_\_\_\_Decrease Profile Limit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**f.\_\_\_\_\_\_\_\_\_\_Decrease Single Transaction Limit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**g.\_\_\_\_\_\_\_\_\_\_Deactivate Card #:­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**h.\_\_\_\_\_\_\_\_\_\_Replacement Card:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2. Approval:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Department Director Print Name Date**

|  |
| --- |
| **I certify that the changes requested above have been executed in accordance with the Purchasing Policy.**  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Purchasing Manager or Designee Print Name Date** |

Revised November 3, 2017